

WHAT IS CLAIMED IS:

1. A method for monitoring the efficacy of a marketing project for a product of a business, the method comprising the steps of:

providing a customer database for storing information about the customers of the business;

providing a number of marketing project parameters;

applying the number of marketing project parameters against the information in the customer database to identify selected customers;

notifying at least some of the selected customers about the product;

determining which of the customers that were notified about the product actually purchased the product; and

determining a marketing project efficacy indicator by noting which of the customers that were notified about the product actually purchased the product.

2. A method according to claim 1 wherein the marketing project efficacy indicator is determined by comparing the number of customers that were notified about the product with the number of the customers that were notified about the product and actually purchased the product.

3. A method according to claim 1 wherein the marketing project efficacy indicator is determined by comparing the number of customers that were notified about the product with the number of the customers that were notified about the product and did not purchased the product.

4. A method according to claim 1 further comprising the step of monitoring revenues generated from the purchase of the product by the customers that were notified about the product.

5. A method according to claim 4 wherein the marketing project efficacy indicator is determined by comparing the revenues generated from the sale of the marketed product relative to a revenue goal.

6. A method according to claim 1 wherein the marketing project efficacy indicator is determined by comparing the number of products sold versus a goal.

7. A method according to claim 1 wherein the notifying step includes distributing marketing material to the selected customers.

8. A method according to claim 7 further comprising the steps of;
modifying the marketing material if the marketing project efficacy indicator is deemed to be too low.

9. A method according to claim 1 further comprising the steps of:
modifying selected marketing project parameters if the marketing project efficacy indicator is deemed to be too low.

10. A method for marketing a product to customers of a business, wherein the business has a number of representatives, and each representative represents a portion of the customers, the method comprising the steps of:

providing a customer database for storing information about the customers of the business;

providing a number of marketing project parameters;

applying the number of marketing project parameters against the information in the customer database to identify selected customers;

providing at least a partial listing of the selected customers to one or more of the representatives;

at least some of the representatives providing information about the product to at least some of their customers listed on the at least partial listing.

11. A method according to claim 10 further comprising the steps of:

monitoring how many and/or which of the customers that were provided marketing information about the product actually purchased the product from a representative of the business.

12. A method according to claim 11 further comprising the steps of:

determining a marketing project efficacy indicator for the marketing project by examining which of the customers that were provided with marketing information about the product actually purchased the product.

13. A method according to claim 12 wherein the marketing project efficacy indicator is determined by comparing the number of customers that were provided marketing information with the number of those customers that were provided marketing information that actually purchased the product from a representative of the business.

14. A method according to claim 11 further comprising the step of:
determining common characteristics for those customers that actually purchased the product from a representative of the business.

15. A method according to claim 10 further comprising the steps of:
monitoring how many and/or which of the customers that were provided marketing information about the product did not purchased the product from a representative of the business.

16. A method according to claim 15 further comprising the steps of:
determining a marketing project efficacy indicator for the marketing project by examining which of the customers that were provided with marketing information about the product did not purchase the product.

17. A method according to claim 16 wherein the marketing project efficacy indicator is determined by comparing the number of customers that were provided marketing information with the number of those customers that were provided marketing information that did not purchased the product from a representative of the business.

18. A method according to claim 15 further comprising the step of:
determining common characteristics for those customers that did not purchase the product from a representative of the business.

19. A method according to claim 10 wherein the business is a financial services business, the method further comprising the steps of:

generating marketing material;

checking the marketing material for compliance with applicable rules and regulations, thereby resulting in compliant marketing material;

providing the compliant marketing material, as well as the at least partial listing of selected customers, to the one or more of the representatives.

20. A method according to claim 10, wherein the at least partial listing of the selected customers is provided to the one or more representatives in a format that is compatible with printing labels.

21. A method according to claim 10, wherein the at least partial listing of the selected customers is provided to the one or more representatives in a format that is compatible with printing envelopes or post cards.

22. A method according to claim 10, wherein the at least partial listing of the selected customers is provided to the one or more representatives in a format that is compatible with a merge function of an application program.

23. A method according to claim 10, wherein the at least partial listing of the selected customers is provided to the one or more representatives in a format that is compatible with a spreadsheet application program.

24. A method according to claim 10, wherein the at least partial listing of the selected customers is provided to the one or more representatives in a format that is compatible with an e-mail program.

25. A method for marketing a product to customers of a business, wherein the business has a number of representatives, and each representative represents a portion of the customers, the method comprising the steps of:

providing a customer database for storing information about the customers of the business;

providing a number of marketing project parameters;

applying the number of marketing project parameters against the information in the customer database to identify selected customers;

providing at least a partial listing of the selected customers to one or more of the representatives;

at least some of the representatives providing information about the product to at least some of their customers listed on the at least partial listing;

identifying those customer that were provided with information about the product;

identifier those customer that actually purchased the product; and

determining a marketing project efficacy indicator for the marketing project by examining which of the customers that were provided with information about the product actually purchased and/or did not purchase the product.

26. A method according to claim 25 wherein the at least partial listing of selected customers is provided to one or more of the representatives upon initiation by the representative.

27. A method according to claim 20 further comprising the step of:
determining a marketing project appeal indicator by monitoring how many representatives initiate the transfer of the at least partial listing of selected customers.

28. A method according to claim 20 further comprising the step of:
making an contact entry in the customer database when a representative contacts a customer about the product; and
determining a marketing project appeal indicator by monitoring the contact entries in the customer database.

29. A method according to claim 25 wherein the at least partial listing of the selected customers that is provided to a particular representative only include customers that the particular representative represents.

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~~29~~. A method according to claim 25 wherein an identifier for each customer that actually purchased the product is generated by having each representative initiate the recording of each sale of the product in the customer database.

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